

THE JOINT OFFICER: A PROFESSIONAL SPECIALIST

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USAWC CLASS OF 2011

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REPORT DOCUMENTATION PAGE				Form Approved OMB No. 0704-0188	
Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing this collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ADDRESS.					
1. REPORT DATE (DD-MM-YYYY) 23-02-2011		2. REPORT TYPE Strategy Research Project		3. DATES COVERED (From - To)	
4. TITLE AND SUBTITLE The Joint Officer: A Professional Specialist				5a. CONTRACT NUMBER	
				5b. GRANT NUMBER	
				5c. PROGRAM ELEMENT NUMBER	
6. AUTHOR(S) Commander Scott A. Carpenter				5d. PROJECT NUMBER	
				5e. TASK NUMBER	
				5f. WORK UNIT NUMBER	
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) Dr. Conrad Crane Army Heritage and Education Center				8. PERFORMING ORGANIZATION REPORT NUMBER	
9. SPONSORING / MONITORING AGENCY NAME(S) AND ADDRESS(ES) U.S. Army War College 122 Forbes Avenue Carlisle, PA 17013				10. SPONSOR/MONITOR'S ACRONYM(S)	
				11. SPONSOR/MONITOR'S REPORT NUMBER(S)	
12. DISTRIBUTION / AVAILABILITY STATEMENT Distribution A: Unlimited					
13. SUPPLEMENTARY NOTES					
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15. SUBJECT TERMS Joint Specialty Officer, Joint Qualification, Goldwater-Nichols, Skelton Panel, Career Management					
16. SECURITY CLASSIFICATION OF:			17. LIMITATION OF ABSTRACT UNLIMITED	18. NUMBER OF PAGES 36	19a. NAME OF RESPONSIBLE PERSON
a. REPORT UNCLASSIFIED	b. ABSTRACT UNCLASSIFIED	c. THIS PAGE UNCLASSIFIED			19b. TELEPHONE NUMBER (include area code)

USAWC STRATEGY RESEARCH PROJECT

THE JOINT OFFICER: A PROFESSIONAL SPECIALIST

by

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ABSTRACT

AUTHOR: Commander Scott A. Carpenter
TITLE: The Joint Officer: A Professional Specialist
FORMAT: Strategy Research Project
DATE: 23 February 2011 WORD COUNT: 6,102 PAGES: 36
KEY TERMS: Joint Specialty Officer, Joint Qualification, Goldwater-Nichols, Skelton Panel, Career Management
CLASSIFICATION: Unclassified

In 1986, Congress passed the Goldwater-Nichols Department of Defense (DoD) Reorganization Act to improve the effectiveness of the Services to execute joint operations. Title IV of the act called for the establishment of a Joint Specialty Officer (JSO) designation to identify those officers particularly educated and experienced in joint matters. The goal was to increase the quality, stability, and experience of officers assigned to joint organizations which, in turn, would improve joint organization outcomes. Despite overwhelming efforts to strengthen joint professional military education, little has occurred to exploit the experiential skills and joint competencies derived from joint assignments. Because of its failure to designate career paths and implement a career management plan for joint officers, DoD is losing valuable “expert” knowledge. This paper explores DoD’s Joint Officer Development approach and highlights the effects of career management methodologies on joint officers. It recommends that DoD identify and implement a specific career management plan for joint professionals, including designated career paths, which will improve the performance and effectiveness of joint organizations.

THE JOINT OFFICER: A PROFESSIONAL SPECIALIST

Men mean more than guns in the rating of a ship.

—Captain John Paul Jones¹

In 1986, Congress passed the Goldwater-Nichols Department of Defense (DoD) Reorganization Act, referred to as Goldwater-Nichols, to improve the effectiveness of the military Services to execute joint operations. Title IV provisions of Goldwater-Nichols directed the establishment of a Joint Specialty Officer (JSO) designation, also referred to as joint specialist, to identify military officers particularly educated and experienced in joint matters.² These provisions were designed to enhance the quality, stability, and experience level of officers in joint assignments.³ In spite of DoD's overwhelming efforts to advance the concept of jointness, little has occurred to exploit the experiential competencies gained by those officers who have served in joint assignment.

The aim of joint officer management should be the professional development and utilization of joint officers. Joint officers must be developed in a deliberate, purposeful manner, not as a matter of course. Moreover, their career paths should be designed to specifically build core competencies related to joint operations and the integrated application of the elements of national power to achieve strategic objectives. Up to this point, joint officer management has not achieved these goals; instead, it has focused too narrowly on simply managing the obtainment of a "joint qualification" credential.

It is time for DoD to genuinely embrace the concept of the joint specialist as envisioned in Goldwater-Nichols by creating a comprehensive approach to Joint Officer Management (JOM). Without a formalized strategic plan, DoD cannot make effective assessments of the current status of, or future requirements for, joint specialists. A

viable plan would address the career expectations of joint specialists by: (1) ensuring their professional expertise is aligned to achieve joint organizational outcomes; (2) ensuring joint specialists are assigned to the right positions inside and outside the joint organizations; and (3) implementing joint specialty career paths and career management policies designed to maximize the utilization of their expertise throughout their careers. Without a strategic plan the military will continue to underutilize this crucial asset of the joint organization.

Background

To achieve our national security objectives, the joint military commander must have at his or her disposal the full complement of our nation's military capabilities. While these capabilities originate within each of the military Services, effective integration is the responsibility of the commander and his/her staff. However, following a series of failed joint operations in the early 1980's, most notably the hostage rescue mission in Iran and the invasion of Grenada, Congress concluded that senior military leaders had little experience in or knowledge of the conduct of joint operations.⁴ Moreover, Congressional testimony revealed a common perception within the officer community that joint duty assignments were undesirable and a hindrance to an officer's career progression.⁵ Consequently, Congress was convinced that legislative action was necessary to reverse this mindset, which in turn, would improve the quality and performance of officers assigned to joint operations.

The Goldwater-Nichols Act of 1986 instituted comprehensive changes in the organizational structure and functional authority of DoD. The primary objective of Goldwater-Nichols was two-fold: to strengthen the joint elements within DoD and to instill a culture of jointness in the officer corps.⁶ Prior to the bill's passage, numerous

congressional reports and testimonies characterized the overall performance of officers assigned to joint duty as follows:

Tour assignment of the Joint Staff officers are only about 30 months on average, even less for general and flag officers. Few [staff officers] have had formal training in Joint Staff work and even fewer [have] previous Joint Staff experience. Only a small percentage have completed joint schooling specific to Joint duty....The average Joint Staff officer, while knowledgeable in his Service specialty, has limited breath of knowledge of his own Service, much less a broad understanding of his sister Services.⁷

The Chairman, Joint Chiefs of Staff Special Studies Group stated the following in its report, "...to be effective, joint institutions require support by officers of the highest quality—officers skilled, experienced, and interested in joint command and staff matters."⁸ Therefore, the authors of Goldwater-Nichols believed DoD needed to develop a joint organization perspective for how military forces should operate.⁹

To ensure the proper career development of officers assigned to joint organizations, Goldwater-Nichols tasked the Secretary of Defense (SECDEF) to establish career guidelines, including the type of duty assignments, for officers designated as joint specialists. Clearly, Congress intended for JSOs to serve a unique purpose in the joint organization—providing comprehensive, inherently joint strategic advice to senior military commanders and top civilian officials. Likewise, Congress also directed the purposeful career development of JSOs to serve as the mechanism to generate and retain joint expertise, thereby transforming the military into a cohesive joint organization.

In 1989, Representative Ike Skelton (D-MO) led a House Armed Services Committee Panel on Professional Military Education (PME), referred to as the Skelton Panel, to review DoD's implementation of key Goldwater-Nichols' provisions. The Skelton Panel confirmed, as Goldwater-Nichols intended, that the continuous,

progressive joint education and relevant joint experience would give JSOs an increased depth of knowledge and understanding of joint matters. Hence, JSO's would be oriented to more effectively integrate multi-service capabilities and generate joint solutions to military problems. The joint perspective would better avail JSOs in developing innovative and creative ways to employ a wider spectrum of force options than existed in a single Service.¹⁰ Furthermore, the Skelton Panel suggested that a small number of joint specialists could be identified and groomed to become strategists. This select cadre would constitute a nucleus of the best thinkers and planners: ultimately serving in critical positions on the Joint Staff and at the national level.¹¹

In conducting its analysis, the Skelton Panel found it essential to fully understand the meaning and purpose of a joint specialist. Regarding this, the Skelton Panel remarked, "Parenthetically, the panel is convinced that defining the JSO is the crux of the problem posed for DoD by all of the Title IV joint officer personnel policies."¹² In developing their portrait of a JSO, the Skelton Panel provided a comparative description of a non-JSO. They further elaborated on the interplay between JSOs and non-JSOs serving on the Joint Staff stating, "In fact, non-JSOs are essential to the proper functioning of the joint system because they bring current service expertise and credibility to bear in considering the solutions to joint problems."¹³ Conversely, JSOs would provide better continuity, more objectivity, and increased experience levels in joint operations beyond the Service perspective. The combined effects of joint education and continuous joint professional experience would result in a keen appreciation of the integrated employment and support of all Services' capabilities.¹⁴ The Skelton Panel further remarked:

Officers who are not joint specialists and who are from other Services will often have more detailed knowledge about the capabilities of their own Service than a JSO....but, because they may be institutionally blind to the full range of options, the JSO must be experienced to ferret out innovative, creative uses of all Service forces, identify limitations, assess the potential synergy of force options, and develop the command and control mechanisms necessary in particular instances.¹⁵

While both are essential in a joint organization, the variance of diversity of education and professional experience promotes synergy.

The Skelton Panel also recognized the need to select theoretical strategists and strategic advisors from among those officers skilled in the application of strategy.¹⁶

Identification is important, because the characteristics unique to theoretical strategists demand a more in-depth professional development scheme.¹⁷ Representative Skelton wrote that developing leaders and strategists is a process that comes from years of careful study, reflection, and experience, citing General John Galvin, USA, who in 1989 wrote, “We need senior Generals and Admirals who can provide solid military advice to our political leadership...and we need officers who can provide solid military advice, options, details—the results of analysis—to the Generals and Admirals.”¹⁸ Clearly there is evidence suggesting that a cadre of joint specialists could serve as expert advisors on matters of national significance.

Goldwater-Nichols also tasked the SECDEF to identify and promulgate a list of joint assignments, referred to as Joint Duty Assignments (JDA), to provide significant joint experience and qualify an officer for JSO designation. Congress mandated that DoD fill at least 50 percent of these billets with either JSOs or JSO nominees.¹⁹ The SECDEF was also required to designate no fewer than 1000 assignments as “critical” JDAs which, by law, are to be filled by a fully qualified JSO. These critical positions are not necessarily key positions (essential to the organization) but are positions where

jointness is considered especially crucial to the organization's effectiveness.²⁰ The number of JDA billets largely impacts three things: (1) the required number of JSO nominations, (2) the required throughput of the joint PME schools, and (3) the available opportunities for officers to complete a JDA prior to promotion to the rank of general or flag officer (GO/FO).²¹

Job Characteristics and Tenure

Categorizing jobs as “developing jobs” and “using jobs” is one methodology used by Dr. Margaret Harrell, of RAND Corporation, to articulate the functional description that jobs serve in an organization.²² The purpose of the former is to develop an individual's skills sets or specific competencies which are deemed valuable while the latter is where those experiences are employed to achieve organizational effectiveness.²³ From a utility perspective, it is desirable for officers to remain in developing jobs for the minimal time necessary to acquire the intended skill set before moving to the next developing job or into a using job. Concurrently, shorter tenure allows more officers to gain a broad level of experience due to throughput. Unfortunately, however, frequent turnover is suboptimal from the organization's perspective. While it is a means of creating a larger pool of officers with general experience, it does so at the expense of maximizing professional expertise and organizational performance.²⁴ These costs manifest themselves in lower-quality performance, workflow interruptions, and splintering of relationships all of which impact effectiveness and organizational outcomes.

Using jobs, on the other hand, are jobs in which the officer, based on accumulated competencies, proficiencies, and/or experiences, is expected to perform key functions on behalf of the organization. Within the organization, using jobs usually

demand a high degree of accountability and stability, and are often critical to the success of the organization.²⁵ Longer tenure in these assignments builds greater depth of expertise, promotes complementary relationships, and allows the officer to reach a point of sustained effectiveness.

Ultimately, tenure of assignment must be weighed against the value of its impact on organizational success. In a RAND Corporation study, Dr. Harrell et al. concluded that regardless of the category of job, longer tenure directly correlates to higher performance.²⁶ Specifically, the authors found that it is in the best interest of the joint organization to have longer-tenured personnel because tenure is more relevant to organizational effectiveness than it is in determining who has received a valid joint experience.²⁷ While length of time doing a joint activity can accrue towards joint experience, tenure in job assignment serves a more useful purpose: to improve organizational effectiveness.²⁸

In general terms, individuals pass through developmental assignments as they progress up-the-ladder in their organization. Since developmental opportunities are often limited, the organization needs an assignment management plan to systematically move individuals through a sequence of developmental jobs in a manner which (1) develops particular competencies valuable to the organization, and (2) makes the individual competitive for a using job at the higher level.²⁹ A rational sequence of developing jobs can be described as a professional career path. These identifiable job patterns suggest that accumulated experience is not serendipitous; therefore, career management is vital to the success of the organization.³⁰

The Joint Officer Development Vision

In 2005 the Chairman, Joint Chiefs of Staff (CJCS) published his vision for Joint Officer Development (JOD). The JOD concept is based on the guiding principle that joint officers are derived from Service officers.³¹ The new concept attempts to inculcate jointness in all colonels and navy captains using a “generalist” approach.³² The stated objective is to produce the largest pool of fully-qualified, inherently joint officers, at the rank of colonel and captain, suitable for promotion to GO/FO.³³ Additionally, the Chairman makes the assertion that, “Attaining the rank of colonel and captain signifies that an officer fundamentally thinks in a joint context...and thereby possesses an unprecedented ability to integrate capabilities across the joint force.”³⁴ But does attaining the rank of colonel or captain, or any rank for that matter, signify that an officer is capable of integrating joint forces, especially when there is no requirement for an officer to serve in a joint assignment prior to being promoted to colonel or captain?

The JOD concept as outlined by the Chairman is not a complete solution. Familiarity with joint operations from a Service perspective does not transform into joint competency. Numerous studies have called for DoD to identify career paths consistent with the cumulative building of deep knowledge and experience essential to the most demanding joint billets.³⁵ In his testimony before the House Armed Services Subcommittee on Total Force in March 2003, Dr. Paul Herbert of Booz Allen Hamilton commented that existing DoD policies create a pool of “joint generalists” with little common experience in joint warfighting, and that joint specialists are not able to put their expertise to best use.³⁶ Similarly, one four star commander’s comment during congressional testimony highlighted this point, “We missed the opportunity to integrate what all the Services bring. If we had had the right people with the right training, the

folks doing the planning would have seen that and taken the right steps to fix it.”³⁷

Institutionalizing this JOD concept could result in a disruption to the development of core competencies required at the strategic level, thereby diminishing joint organization effectiveness and operational performance.³⁸

The results of the US Navy’s FY12 Major Command Board reflect the haphazard and non-binding nature of the generalist approach to JOD. The board, which convened in November 2010, selected 41 Surface Warfare Officers to serve in O-6 command positions.³⁹ These officers are considered by the Surface Warfare Community to be its top officers, those with potential to serve as flag officers. Of the 41 officers selected, 13 (31.7 percent) have completed JPME Phase II and only 11 (26.8 percent) are joint qualified. More alarming is the fact that two of the officers selected have not yet completed JPME Phase I.⁴⁰ These results give a much different impression of the significance of joint officer qualification to one’s career. From the individual’s perspective, why would an officer serve in a joint assignment when three times the number of officers without joint experience are being selected for serve in a flag officer milestone assignment?⁴¹

The new JOD concept does not align development of joint expertise to joint assignment requirements. Without question, the objective of JOD should be directly tied to improving the effectiveness and performance of the joint organization. Nonetheless, the objective of creating the largest pool of joint qualified officers for promotion to GO/FO effectively translates into maximizing throughput and correspondingly shorter tenure in joint assignments. It removes the impetus for the Services to assign joint qualified officers to a second joint assignment because the Services must use every

available joint assignment opportunity to increase their pool of qualified officers. Each officer who serves in a second JDA removes a promotion qualifying opportunity from another officer not yet joint qualified.

Joint Officer Management

DoD's plan for Joint Officer Management (JOM) is designed to progressively develop officers in joint matters throughout their careers. It includes alternative ways to recognize and award officers with joint experience credit that are currently being missed, as long as the position and/or context of work are relevant to joint matters.⁴² Under the new system, the term Joint Qualified Officer (JQO), synonymous with Joint Qualification Level III, supersedes the previous JSO designation.⁴³ The JOM incorporates the generalist approach centered on a flexible qualification system that benefits the busy officer and a Service-oriented officer management system. According to the Chairman:

Officers and Services will find it easier to reconcile Service and joint assignment options, consequently more assignments that deepen an individual officer's personal occupational competency will be easier to link to achieving the common objective of JOD.⁴⁴

However, allowing piecemeal joint duty credit gives the Services an incentive to keep officers in their primary career paths. Moreover, deepening an officer's occupational competency is akin to becoming a specialist within one's Service. This derails joint officer development from the joint perspective because it insulates officers from joint organizations thus limiting, even removing, valuable expert knowledge. Additionally, the new approach removes the correlation between joint education and joint assignment which by design was intended to enhance job performance in the joint arena.

While the JOM provides the mechanism for how officers acquire joint qualifications, it lacks a means by which DoD will develop and utilize these officers. Organizations do not exist for the purpose of providing officers joint experience, traditional or otherwise.⁴⁵ On the contrary, the purpose of “jointness” is to develop a highly effective joint organization.⁴⁶ Nonetheless, the failure is not the result of implementation; it is a result of the strategic approach to JOM. The concept breaks down at the point of developing the proficiency level of joint officers. Relatively speaking, current proficiencies never improve beyond a baseline level because there is no mechanism to retain joint expertise in the joint organization. Without purposeful management and utilization of acquired joint expertise, there is no net gain in organizational performance.

Joint Specialty Officer Revisited

Goldwater-Nichols sanctioned the joint specialist as a professional of the joint community. Congress believed that the experiences of joint specialists were uniquely different and therefore required careful management to sustain their development. Establishment of joint officer career paths and career management guidelines consisting of developmental jobs, advanced education opportunities, and using jobs at the upper levels of our national and military organizations would better support JOD. To move forward, DoD should ask specific questions regarding the value and demand for joint officers. These include, principally: (1) what is the relative importance of joint officer experience?; (2) How does it relate to joint organizational outcomes?; and (3) What career paths and management policies will sustain its development?

In congressional testimony on September 10, 2009, Lieutenant General David Barno, USA (Ret.), observed that our current officer management system paradoxically

identifies expert tacticians for promotion and then expects them to magically re-create themselves as strategic leaders.⁴⁷ His testimony highlighted the fact that the Service's officer management policies are almost exclusively biased on the tactical level and command, and those who pursue specialization paths, even in areas as vitally important as national security and military strategy formulation, risk upward mobility because Service policies do not value this kind of expertise.⁴⁸ Nonetheless, if so much emphasis is given to the importance of tactical experience in developing combat arms officers, one could conclude that experience is, in fact, the de facto means of developing competencies and professional expertise.

Joint expertise, however, comes from increasingly challenging and reinforcing joint assignments—density of experience—which leads to professionalization in joint matters. A 2008 Center for Naval Analyses (CNA) report identified the functional difference between officers with operational expertise and those possessing staff expertise in operational planning. More importantly, the report indicated that Navy leadership realizes the value of talented staff officers and believes the officer management process can recognize and promote those that specialize as staff officers.⁴⁹ Unfortunately, there are no definitive, qualifying measures of effectiveness regarding joint officer proficiency or joint expertise.

Observations from various interviews and surveys of joint staff officers and senior leaders indicate that on average, joint staff officers experience a seven to twelve month learning curve, and that approximately 25 percent needed anywhere from ten months to two years to master their jobs.⁵⁰ More significant was the difference between the need for JPME Phase II and prior joint experience. To perform their duties successfully, 39

percent of the officers indicated that JPME Phase II was either required or desired compared to 75 percent who reported prior joint experience was required or desired.⁵¹ Those who did have prior staff experience remarked that even this experience was not sufficient preparation for the content or context of staff work required in a strategic level joint command. In comparison, on a scale of 1 to 5 with 5 as the highest, those with prior joint staff officer experience ranked its relevant importance to their effectiveness a 4.0.⁵² Additionally, the percentage of officers indicating that prior joint experience was the most important to their success increased by a factor of three between paygrades O-3 and O-6.⁵³ Table 1 below summarizes survey results of average effectiveness ratings for prior education, training, and experience in preparing officers for their joint assignment.⁵⁴

<i>Institution/Experience</i>	<i>Number of respondents</i>	<i>Average Effectiveness Rating: 0=No Help; 3=moderately helpful; 5=exceptional</i>
AJPME	19	4.0
Civilian University	1005	2.15
Content Specific Training/Other	250	3.6
ILE/JPME I	959	3.2
Joint Staff, Pentagon	59	4.05
JPME II (10 or 12 week course)	309	2.7
Previous staff officer billet	595	3.6
Senior PME/JPME II (War College equivalent)	194	2.8
Service Academy	291	2.45
Service Command (squad, wing, unit, company, battalion level command)	274	3.0

Table 1:

Past implementation of JSO policies have shortchanged the development of expert joint knowledge. Recall that Goldwater-Nichols was needed to rectify ineffectness in the joint organization caused by inexperience and constantly changing staffs.⁵⁵ Nonetheless, longstanding officer management systems favor the development

of equally qualified “generalists” at the expense of “specialists” with deep knowledge in a narrow area.⁵⁶ The Beyond Goldwater-Nichols Phase 2 study advocated for the creation of joint specialist career paths alongside the command oriented career paths.⁵⁷ To be of value to the joint organization, joint officers require separate career management policies that capitalize on their joint expertise.

Career Management Models

Identifying the competencies individuals need to possess is important, but it is equally important to identify a process or system that develops, to a high degree, these individuals. Generally speaking, organizations acquire human resources that either possess or can develop the competencies that are aligned with or produce desired organizational outcomes. For example, military officers, individually and collectively, apply competencies to produce outcomes that support mission accomplishment for the organization they serve.⁵⁸ Therefore, a strategic approach to JOD should include a career model that develops the joint officer competencies which supports the joint organization.⁵⁹

The selection of the best career model largely depends on whose perspective is being considered: the individual officer, the joint organization, or the officer’s Service organization.⁶⁰ Currently, the Services control officer development. They educate, assign, promote, and manage their officers based on their own need for highly qualified officers to serve as commanders and on Service-specific headquarters staffs.⁶¹ However, Service derived career development models do not necessarily develop the desired competencies needed to serve in an organization predominately focused on joint matters and strategic issues. The value of experiential development of joint expertise, and those who possess this expertise, needs to be recognized as an asset of

the joint organization.⁶² Unfortunately, as previously shown, the JOD concept does not align development of joint expertise to joint assignment requirements, for the purpose of building a more effective joint organization.

To create an incentive for officers to become joint specialists, DoD must: (1) generate a demand signal for this expert knowledge, and (2) designate a career path which allows these officers to flourish. To achieve this, JOM policies should focus on managing officers whose competencies required special consideration in order to maximize their potential contribution to joint organizational outcomes.⁶³ Joint assignments would be linked together to form a series of developmental and using jobs creating career paths for joint specialists. These paths would represent viable career tracks leading to senior level joint assignments, those that demand a high degree of joint expertise or are suitable for a theoretical strategist.

In 1999, RAND conducted an Interagency Assignment Officer Career Management study which has many parallels for how DoD could manage a cadre of joint officers. The authors described the career model currently used for managing combat arms officers as managing the generalist.⁶⁴ The objective of this model was to develop breadth of knowledge by exposing combat arms officers to a variety of positions primarily within their specific career field. Although it was Service-oriented, its goal was to develop leadership competencies applicable in a wide range of positions leading to command.

The authors considered various career models applicable to managing a specialized group of officers such as a cadre of joint officers. These models can be described as: managing by exception, managing leader succession, managing

competencies, and managing skills.⁶⁵ Tables 2, 3, and 4 capture various career model characteristics associated with officers and the career model.⁶⁶

Career Model	O-4	O-5	O-6
Managing Leader Succession	None	Low	Medium; current through education only
Managing Competencies	Low	Medium	Deep; current through education and experience
Managing Skills	None	Low	Medium; current through education only
Managing the exception	None	None	Low; current through education only

Table 2: Depth and Currency of Joint Expertise at each Grade

Career Model	O-4	O-5	O-6
Managing Leader Succession	None	Few	Most
Managing Competencies	Half	Most	Most/All
Managing Skills	None	Few	Most
Managing the exception	None	None	Few

Table 3: Joint Positions Filled by Officers with Prior Joint Experience

Career Model	Nature
Managing Leader Succession	Likely Future GO/FO
Managing Competencies	Joint Expert/Theoretical Strategists
Managing Skills	Typical Service Experience, but perceived lower quality
Managing the exception	Assignment Available

Table 4: Characteristic Quality of Officers in each Model

The following is a summarized description of the three primary career management models as they pertain to joint officers: (1) Managing leadership succession model in which joint officers are managed in a manner to identify those

qualified to fill the top Service positions (higher promotion rates, shorter tour lengths); (2) Managing competencies model which places emphasis on developing intensely experienced officers in joint matters (a joint cadre) which has longer and repeated joint assignments to build expertise; and (3) Managing skills model used to distribute joint experience throughout the officer corps.⁶⁷

In 2009, RAND completed an analysis, based on their previous study, which compared the managing leader succession, managing competencies, and managing skills career models, relative to average non-joint combat arms officers. Table 5 below illustrates the comparison of career model outcomes.⁶⁸ The symbols used in Table 5 reflect comparisons based on typical Service outcomes, ranging from slightly more/less likely (>, <) to much more/less likely (>>>, <<<).

Summary of Differences Between Promotion and Retention in Management Frameworks Relative to Average, Non-Joint Officers			
	Managing Leader Succession	Managing Competencies	Managing Skills
Promotion to O-5	>	>	=
Promotion to O-6	>	<	=
Promotion to O-7	>>	<<	=
Retention at O-4	>	=	=
Retention at O-5	>	<	=
Retention at O-6	>>	>>	=
Likelihood of second joint job at or before O-4	<<<	>	<
Likelihood of second joint job at or before O-5	<<	>>	<
Likelihood of second joint job at or before O-6	<	>>>	<
Tour length	<	>>	=
NOTE: Symbols indicate a comparison with the average and typical outcomes for the overall service.			

Table 5:

A closer inspection reveals some key characteristics and assumptions associated with each career model. The comparison indicates that the results of the managing skills model is relatively equal to average, non-joint combat arms officers. Comparatively speaking, this means that if the managing skills model is used, those who have joint experience and those who do not are equally likely to be promoted and retained, and they will serve the same length of time in a joint assignment. However, these joint officers are slightly less likely to serve in a second joint assignment because the managing skills model is designed to maximize the number of officers who receive joint experience.

The managing leader succession model analysis indicates that those higher-quality combat arms officers with joint experience are slightly more likely to promote through O-6 and are more likely to be promoted to GO/FO compared to average non-joint qualified combat arms officers. The retention results for these officers are also greater. These higher-quality officers will serve a slightly shorter tenure in their joint assignment and are less likely to serve in a second joint assignment.

The managing competencies model analysis indicates that those who become joint officers (part of a cadre) initially experience slightly higher promotion to O-5 compared to average non-joint combat arms officers. However, joint officers are slightly less likely to be promoted to O-6 and even less likely to be promoted to GO/FO than average non-joint combat arms officers. Joint officers will serve longer joint tour lengths and more than likely will continue to serve in joint assignment.

A cursory look at Table 5 leads one to infer that the managing leader succession model is superior. However, an examination of the assumptions behind each model and

the fact that the comparisons are made relative to average non-joint combat arms officers are significant to interpreting the results.

First, it is important to note that when considering the managing skills model, there is no relative difference for promotion between those combat arms officers who have joint experience and those who do not. This can be attributed to the fact that average officers promote and retain equally. Second, the analysis of using the managing competencies model for joint officers, which results in a slightly less than average promotion rate to O-6 compared to average non-joint qualified combat arms officers, is more indicative of completing an O-5 command assignment (keep in mind those officers who become part of a cadre of joint officers will serve in multiple joint assignments instead of command assignments which make them relatively less competitive for promotion to O-6 than average non-joint combat arms officers). It is also important to consider that if DoD only prescribes a small number of O-6 jobs and no GO/FO jobs for joint officers managed by the competency model then promotion opportunities beyond O-5 will be very limited and therefore the majority of joint officers will not remain in the military beyond O-5.

The relatively shorter joint assignment in the managing leader succession model is consistent with a pattern of developing leaders.⁶⁹ This model presumes that only higher-quality officers will be sent to joint assignments, but would not remain in those jobs for long, and only a minimal number would serve a second joint assignment prior to promotion to GO/FO.⁷⁰ Further inspection of this model also reveals that too much joint experience or joint experience at the wrong juncture in a career can be detrimental, even for officers who are considered higher-quality.⁷¹

Other inherent aspects of the managing leader succession model include a number of GO/FO billet opportunities associated with combat arms officer's career tracks—a contributing factor to promotion and retention rates. Finally, comparing the results of the managing leader succession and managing skills models suggests that the increased promotion and retention rates are more indicative of the higher-quality officers portrayed in the managing leader succession model and not at all related to serving in a joint assignment.

The RAND study observed that although joint officers are not currently managed as a separate group, existing management practices reflect those characteristics found in the managing by exception and managing leader succession career models.⁷² However, it must be emphasized that the managing leader succession and managing by exception models provide more weight to the individual officer's and the Services' perspectives than to the joint perspective.⁷³ Given the assumptions, the RAND analysis shows that the managing leader succession model produces, promotes and retains, more officers with joint experience.⁷⁴ Admittedly, this fulfills the objective outlined in CJCS's JOD. However appealing this is, it conflicts with the needs and requirements of the joint organization as demonstrated by the findings of numerous studies, reports, and senior officer testimonies. RAND concluded that when the joint organization's interests are given priority and the contribution to national security of the work performed by joint specialists is considered valuable, the managing competencies model is preferred.⁷⁵

Recommendation and Conclusion

DoD must revisit the original idea of the joint specialist, the creation of which was intended to improve the performance and effectiveness of joint organizations.⁷⁶ Joint expertise must be optimized across DoD and not regulated to the Services.

Unfortunately because the Services are responsible for managing officer assignments the Service perspective takes priority over the joint perspective when it comes to developing joint officers. Hence, joint qualification resembles a time-share approach where officers serve in a joint billet for a brief interlude before returning to their primary career path.⁷⁷ Tension exists between satisfying professional—career—advancement, on the one hand, and professional—expertise—development, on the other.⁷⁸ A review of DoD's annual Goldwater-Nichols Act Implementation Reports between 1995-2005 is evidence that the Services have not shown due-diligence in developing joint specialists or filling critical joint assignments with properly qualified officers.⁷⁹

An effective JOM framework would serve the joint organization better by developing the expertise that it values. It would recognize this expert knowledge as an asset of the joint organization by designing career paths to support its development and optimize its utilization. Joint specialists will build depth of expertise through interrelated and reinforcing joint assignments, faculty positions at military institutions, and postings to external agencies where military expertise is in demand or where DoD can enhance the whole of government concept.⁸⁰ Additionally, strategists and regional specialists would be vetted from this cadre, provided with doctorate level education opportunities, and assigned to key national security positions.⁸¹

There are various architectures DoD could develop to create the joint officer community.⁸² One possible construct would ideally reflect the JSO, non-JSO concept outlined in Goldwater-Nichols and expounded on by the Skelton Panel. For argument's sake, this cadre of joint professionals would represent half of the total JDA requirement. Joint officers would possess depth of joint knowledge, staff officer stability, and internal

operational expertise: the core capabilities necessary to deliver the desired performance outcomes. They would create and preserve a body of knowledge, and would serve as subject matter experts in joint matters, available to mentor, guide, and teach others.⁸³ Concurrently, their non-JSO counterparts, ideally high quality combat arms officers, would bring the newest operational concepts, current insight, and creativity to the joint organization.⁸⁴ This self-reinforcing tandem would form a highly effective, agile, joint team enhancing the effectiveness of the joint force.

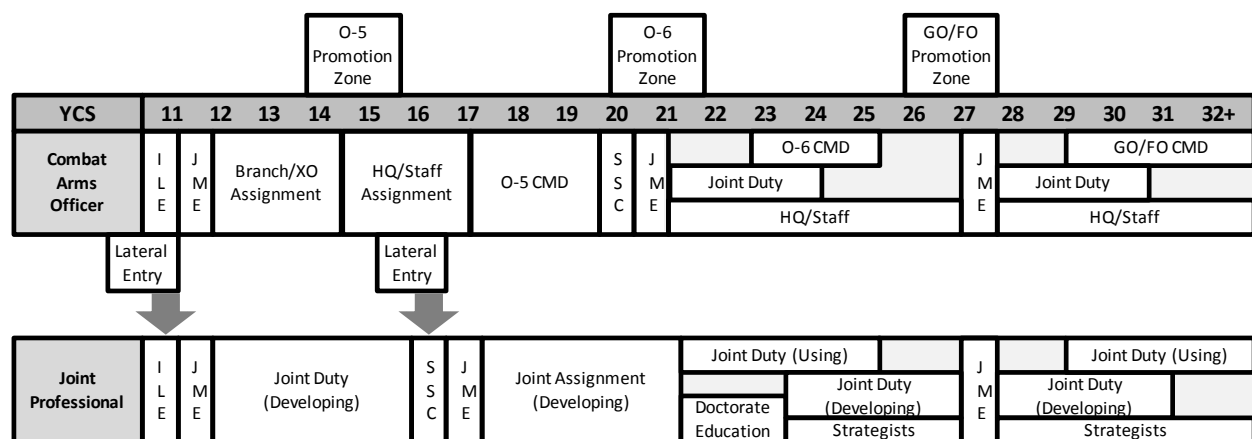


Figure 1:

Career management and assignment screening for joint officers would be handled via the establishment of a new DoD Joint Officer Advisory Board composed of representatives from each of the Services. The screening board would be responsible for approving Service nominations for joint officers, conduct periodic reviews to ascertain an officer's development, and screen each joint officer for follow-on assignments or advanced education programs. To preserve the joint perspective, this screening board must reside at the DoD level, in the Office of the Undersecretary of Defense for Personnel and Readiness for example.⁸⁹ This process would allow DoD a means to survey available talent and to identify gaps in joint community expertise and initiate mitigation strategies.⁹⁰ Using specific language to characterize those joint officer with the potential for higher level assignments or specific education programs, the board's results would be included in each officer's performance report and coordinated with the Services' promotion board proceedings.

Officers aspiring to the most demanding joint billets should know what kind of joint expertise is needed to do the job.⁹¹ Therefore, the main role of the Joint Officer Advisory Board would be to designate career patterns within the JDA structure for joint professionals. The objective is to administer the sequencing of developing jobs leading to top GO/FO using jobs for joint officers. The key is to identify senior level positions that would be filled exclusively by joint professionals which would then dictate prerequisite assignments to develop the necessary credentials.⁹² Possible candidates for top-level joint professional positions could ideally be Director or Deputy Director of the Joint Staff, J5 or J7 Directors, or President of National Defense University.

Additionally, the board would be responsible for vetting requests for special advisors or internships with other federal agencies.

The proposed cadre of joint professionals may constrain the JQO qualification system for combat arms officers due to the re-allocation of joint billets. The existing number of JDA opportunities may be sufficient to ensure combat arms officers continue to meet promotion requirements. Nonetheless, a review of the present requirement that officers are designated JQO prior to promotion to GO/FO should be conducted to validate this requirement. This review should consider if completion of both JPME and a joint assignment should remain strictly a promotion requirement or if completion of a joint assignment should be recast as a pre-requisite to being a joint commander.

In summary, although DoD has achieved significant improvements in executing joint operations since Goldwater-Nichols, it has come up short in developing a comprehensive approach for joint officer management, more specifically, the utilization of joint professionals. The right approach would include a systematic process of reinforcing education and joint assignment experiences to consistently and purposefully yield expert knowledge in joint matters.⁹³ The need for joint professionals is already high, and demand is increasing. All that remains is for DoD to fully recognize the value of joint officers and the significance of their contribution to joint operations.

Endnotes

¹ James Stavridis and William P. Mack, *Command at Sea*, 5th ed. (Annapolis: Naval Institute Press, 1999), 110.

² Goldwater-Nichols Department of Defense Reorganization Act of 1986, Public Law 99-433, 99th Cong., 2nd sess., (October 1, 1986), Title IV, sec 401.

³ Congress, House, Committee on Armed Services, Panel on Military Education, *Report of the Panel on Military Education of the One Hundredth Congress of the Committee on Armed Services, House of Representatives*, 101st Cong., 1st sess. (Washington, DC: Government Printing Office, April 21, 1989), 52.

⁴ John F. Schank, et al., *Who is Joint? Reevaluating the Joint Duty Assignment List* (Santa Monica: The RAND Corporation, 1996), 45.

⁵ Ibid.; Congress, *Report of the Panel on Military Education of the One Hundredth Congress of the Committee on Armed Services, House of Representatives*, 45 and 53-54; Congress, House, Committee on Armed Services, Subcommittee on Oversight and Investigations, *Another Crossroads? Professional Military Education Two Decades After the Goldwater-Nichols Act and the Skelton Panel*, April 2010, Committee Print 111-4, 40.

⁶ Congress, *Report of the Panel on Military Education of the One Hundredth Congress of the Committee on Armed Services, House of Representatives*, 11.

⁷ Congress, House, Committee on Armed Services, *Bill Nichols Department of Defense Reorganization Act of 1986 Report of the Committee on Armed Services on H.R. 4370 (including costs estimates of the Congressional Budget Office)*, 99th Cong., 2nd sess., H Rep 99-700, (Washington, DC: Government Printing Office, July 21, 1986), 40-42.

⁸ The *Chairman's Special Studies Group: On the Organization and Functions of the Joint Chiefs of Staff* report also recommended specific provisions to improve the performance of officers assigned to joint staffs. These provisions included: the creation of a joint duty career specialty; education in joint schools (AFSC, NWC, ICAF); and a mix of Service and joint assignments.

⁹ Schank, *Who is Joint? Reevaluating the Joint Duty Assignment List*, 46.

¹⁰ Congress, *Report of the Panel on Military Education of the One Hundredth Congress of the Committee on Armed Services, House of Representatives*, 55.

¹¹ Ibid., 5, 28-29, 40, and 56.

¹² Ibid., 52.

¹³ Ibid., 57.

¹⁴ Ibid., 56.

¹⁵ Ibid., 62.

¹⁶ Ibid., 28.

¹⁷ Being a Strategist is, in reality, a specialty. In place of commanding, the Strategist's career experience consists of recurring educational programs and operational assignments. Repeated strategic-level assignments provide the cornerstone of their development setting them apart from their contemporaries, see Charles P. Moore, "What's the Matter with Being a Strategist (Now)?" *Parameters* 39, no. 4 (Winter 2009-10): 9 and 14-16.

¹⁸ Congress, *Another Crossroads? Professional Military Education Two Decades After the Goldwater-Nichols Act and the Skelton Panel*, 11; Notable behind-the-scenes strategic advisors such as Nagl, Yingling, McMasters, and Mansoor were known for offering expert advice and insight to their bosses, see Robert H. Scales, "Return of the Jedi," *Armed Forces Journal* 145, no. 3 (October 2009): 22.

¹⁹ Because Title IV requires sequential development of JSOs, officers would first complete joint Professional Military Education (JPME Phase I and JPME Phase II) and then serve in a JDA as a JSO nominee. After successful completion of a full joint duty tour, they can be recommended by their Service component for JSO designation.

²⁰ U.S. Government Accounting Office, *Designation of Joint Duty Assignments: Report to the Congressional Requesters* (Washington, DC: Government Accounting Office, February 1990), 14.

²¹ Schank, *Who is Joint? Reevaluating the Joint Duty Assignment List*, 37-55.

²² Margaret C. Harrell, et al., *Aligning the Stars: Improvements to General and Flag Officer Management* (Santa Monica: The RAND Corporation, 2004), xvii.

²³ Ibid.

²⁴ Ibid., 2 and 59.

²⁵ Ibid., 18.

²⁶ Ibid., 2 and 59.

²⁷ Margaret C. Harrell, et al., *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results* (Santa Monica: The RAND Corporation, 2009), xxxii.

²⁸ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, 138; Additional research convincingly demonstrates that it is tenure in the project team and not organizational tenure that is more likely to influence project performance. Research and development communication and project performance, in relation to group longevity, reached a maximum between 1.5 and 5.0 years, see Ralph Katz, "The Effects of Group Longevity on Project Communication and Performance," *Administration Science Quarterly* 27 (March 1982): 88-96.

²⁹ Harrell, *Aligning the Stars: Improvements to General and Flag Officer Management*, 16.

³⁰ Ibid.

³¹ U.S. Joint Chiefs of Staff, *CJCS Vision for Joint Officer Development* (Washington, DC: U.S. Joint Chiefs of Staff, November 2005), 1.

³² Ibid., 8.

³³ Ibid., 3 and 8; Also see U.S. Department of Defense, *Strategic Plan for Joint Officer Management and Joint Professional Education*, (Washington, DC: U.S. Department of Defense, April 3, 2006), 17-18.

³⁴ Ibid.

³⁵ Clark A. Murdock, et al., *Beyond Goldwater-Nichols: U.S. Government and Defense Reform for a New Strategic Era, Phase 2 Report* (Washington, DC: Center for Strategic and International Studies, 2005), 113-114; Dr. Paul Herbert and Mr. Stuart Wilson, "Statement Before the subcommittee on Total Force, House Armed Service Committee U.S. House of Representatives," March 19, 2003, <http://armedservices.house.gov/comdocs/openingstatementsandpressreleases/108thcongress/03-03-19herbert.html> (accessed November 15, 2010).

³⁶ Herbert, "Statement Before the subcommittee on Total Force, House Armed Service Committee U.S. House of Representatives."

³⁷ Ibid.

³⁸ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, xxix; Following the 9/11 attacks, Paul Wolfowitz, Deputy Secretary of Defense, employed a team of scholars and Washington D.C. think tanks to develop a strategic plan to address the crisis and prevent others from developing. He chose to outsource his strategy development based on his belief that the military was incapable of producing the kinds of ideas and strategy needed to deal with the crisis, see Moore, "What's the Matter with Being a Strategist (Now)?" 7.

³⁹ U.S. Navy Captains (O-6) screened for Commanding Officer assignments of Ticonderoga Class Cruisers or as Commanders of Destroyer Squadrons.

⁴⁰ "PERS-41 Quarterly Newsletter", 1st Quarter FY2011, 2, issue 1, linked from Navy Personnel Command PERS-41 Surface Warfare home page, <http://www.npc.navy.mil/NR/rdonlyres/195B4979-7075-4B12-916D-0D834EC0EEB8/0/FY11Q1PERS41QuarterlyFinal22DEC10.pdf> (accessed January 10, 2011), 5.

⁴¹ For an illustration of a similar occurrence regarding the emphasis placed on joint experience and JPME education for those officers considered to be top performers within the U.S. Army see Charles D. Allen, "Redress of Professional Military Education: The Clarion Call," *Joint Force Quarterly*, no. 59 (4th Quarter, 2010): 96-99.

⁴² U.S. Department of Defense, *Joint Officer Management: Joint Qualification System Implementation Plan* (Washington, DC: U.S. Department of Defense, March 30, 2007), 3.

⁴³ Ibid., 5 and A-2.

⁴⁴ U.S. Joint Chiefs of Staff, *CJCS Vision for Joint Officer Development*, 8.

⁴⁵ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, 138.

⁴⁶ Ibid.

⁴⁷ Congress, House, Committee on Armed Services, Subcommittee on Oversight and Investigation, *Charting the Course for Effective Professional Military Education: H.A.S.C. 111-93*, 111th Cong., 1st sess., September 10, 2009; Maj Gen Scales, USA (Ret.) wrote, “The irony of the system is that the requirement for competence shifts from the tactical to the strategic at just the time in their careers when tactical officers leave command and move on to higher levels of responsibility at the colonel and flag level. As a result, too often we see skillful tacticians thrust into strategic staff jobs they are ill-prepared to perform,” see Scales, “Return of the Jedi,” 22.

⁴⁸ Congress, *Charting the Course for Effective Professional Military Education*, September 10, 2009; Scales, “Return of the Jedi,” 22-24.

⁴⁹ David M. Rodney, et al., *Developing an Education Strategy for URL Officers* (Alexandria, VA: Center for Naval Analyses (CNA), 2008), 15-16.

⁵⁰ U.S. Joint Chiefs of Staff, *The Joint Staff Officer Project: Final Report* (Washington, DC: U.S. Joint Chiefs of Staff, April 2008), 25.

⁵¹ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, 27.

⁵² U.S. Joint Chiefs of Staff, *The Joint Staff Officer Project: Final Report*, 57.

⁵³ Shelia Nataraj Kirby, et al., *Who Is “Joint”? New Evidence from the 2005 Joint Officer Management Census Survey* (Santa Monica: The RAND Corporation, 2006), 92.

⁵⁴ U.S. Joint Chiefs of Staff, *The Joint Staff Officer Project: Final Report*, 58.

⁵⁵ Herbert “Statement Before the subcommittee on Total Force, House Armed Service Committee U.S. House of Representatives.”

⁵⁶ Murdock, *Beyond Goldwater-Nichols: U.S. Government and Defense Reform for a New Strategic Era, Phase 2 Report*, 109; A recent study done by Harvard Business Review identified different leadership qualities displayed between the Services based on the context of experiences. They characterized Navy and Air Force officers as more suitable in both process-driven and innovative environments. Officers in the Army and Marine Corps, on the other hand, are characterized as better suited in adaptive and team settings. Their research points out how the Services’ leader development culture—flexibility (Army and Marine Corps) versus process (Navy and Air Force)—clearly influences subsequent corporate performance, see Boris Groysberg, Andrew Hill, and Toby Johnson, “Which of These People Is Your Future CEO? The Different Ways Military Experience Prepares Managers for Leadership,” *Harvard Business Review* 88, no. 11 (November 2010): 82-85.

⁵⁷ Murdock, *Beyond Goldwater-Nichols: U.S. Government and Defense Reform for a New Strategic Era, Phase 2 Report*, 112.

⁵⁸ Harry J. Thie, Margaret C. Harrell, and Robert M. Emmerichs, *Interagency and International Assignments and Officer Career Management* (Santa Monica: The RAND Corporation, 1999), 8.

⁵⁹ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, 2.

⁶⁰ Thie, *Interagency and International Assignments and Officer Career Management*, xxii.

⁶¹ Congress, *Another Crossroads? Professional Military Education Two Decades After the Goldwater-Nichols Act and the Skelton Panel*, 17.

⁶² Different experiences generate different perspectives and when the human capital is appropriately matched to the organization, it creates value, see Groysberg, "Which of These People Is Your Future CEO? The Different Ways Military Experience Prepares Managers for Leadership," 85.

⁶³ Thie, *Interagency and International Assignments and Officer Career Management*, 51.

⁶⁴ *Ibid.*, 9.

⁶⁵ *Ibid.*, xvii.

⁶⁶ *Ibid.*

⁶⁷ *Ibid.*, 10-25.

⁶⁸ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, 86.

⁶⁹ *Ibid.*, 82.

⁷⁰ *Ibid.*

⁷¹ Thie, *Interagency and International Assignments and Officer Career Management*, 66-93.

⁷² *Ibid.*, xx and 25.

⁷³ *Ibid.*, 52.

⁷⁴ Harrell, *A Strategic Approach to Joint Officer Management: Analysis and Modeling Results*, 102.

⁷⁵ Thie, *Interagency and International Assignments and Officer Career Management*, 52.

⁷⁶ Don M. Snider and Jeffery Peterson, "Opportunity for the Army: Defense Transformation and New Joint Military Profession," in Lloyd J. Mathews, ed. *The Future of the Army Profession*, 2nd ed. with Don M. Snider as project director (Boston: McGraw Hill, 2005), 240.

⁷⁷ *Ibid.*, 241.

⁷⁸ Ibid., 244.

⁷⁹ U.S. Department of Defense, "Annual Defense Report to the President and Congress," 1995-2005, linked from *The Office of the Executive Secretary of the Department of Defense Home Page*, at <http://www.dod.gov/execsec/index.html> (accessed January 3, 2011).

⁸⁰ The demand for Army Strategists is increasing; not only within the Army but other government agencies have realized the value of these strategists. Interagency demand is outpacing the supply; Department of State, Treasury, and Homeland Security are actively seeking strategists to enhance their planning capability, see Moore, "What's the Matter with Being a Strategist (Now)?" 17.

⁸¹ The U.S. Army currently has more than 400 military strategists, designated as Functional Area 59, Strategic Plans and Policy officers, serving as strategic advisors at the division to combatant commander level. These strategists occupy key positions within the broader defense community, serving on the National Security Council, Joint Staff, Army Staff, Office of the Secretary of Defense, and recently at the Treasury and State Departments, see Moore, "What's the Matter with Being a Strategist (Now)?" 6 and 9-12.

⁸² Another option, advocated by Maj Gen Scales, is the establishment of a Senior Strategists Program, a cohort of highly developed strategic planners and thinkers. Additionally, he advocates specifically designating key strategic billets for these specialists, some of which would be considered prime GO/FO billets, see Scales, "Return of the Jedi," 24.

⁸³ U.S. Joint Chiefs of Staff, *The Joint Staff Officer Project: Final Report*, 21.

⁸⁴ Research suggests that new group members have a relative advantage in generating fresh ideas and approaches that project veterans might have ignored. Essentially, these newcomers enhance the scope of accumulated knowledge, see Katz, "The Effects of Group Longevity on Project Communication and Performance," 101-102.

⁸⁵ Snider "Opportunity for the Army: Defense Transformation and New Joint Military Profession," 247.

⁸⁶ Ibid.

⁸⁷ These programs of study include: U.S. Navy's Naval Operations Planner Course (NOPC), U.S. Army's School of Advanced Military Studies (SAMS); U.S. Marine Corps' School of Advanced Warfighting (SAW); U.S. Air Force's School of Advanced Air and Space Studies (SAASS); Maritime Advanced Warfighting School (MAWS); and Joint Advanced Warfighting School (JAWS). Gen. Schwartzkopf employed a team of strategic advisors during Operations Desert Storm known as the "Jedi Knights" who were all graduates of SAMS, see Scales, "Return of the Jedi," 24.

⁸⁸ U.S. Joint Chiefs of Staff, *The Joint Staff Officer Project: Final Report*, 69; Army Strategists (FA-59) officers typically serve three year assignments in order to provide ample time to acquire genuine expertise in a particular region or function as well as a semblance of staff continuity, see Moore, "What's the Matter with Being a Strategist (Now)?" 13.

⁸⁹ Maj. Gen. Scales suggests that, “Experience with the Skelton reforms suggests that such a system would require iron-tight oversight at the very top to prevent the Services from suborning the spirit of [his proposed] Senior Strategists Program....at the assistant secretary level in the Office of the Secretary of Defense should be appointed...to ensure that the intellectual demands aren’t held captive to the respective Service human resources communities.” See Scales, “Return of the Jedi,” 25.

⁹⁰ U.S. Department of Defense, *Civilian National Security Professional Development Implementation Plan* (Washington, DC: U.S. Department of Defense, September 19, 2008), 36-37.

⁹¹ Murdock, *Beyond Goldwater-Nichols: U.S. Government and Defense Reform for a New Strategic Era, Phase 2 Report*, 114.

⁹² Because there is no established credentialing for the Joint Professional, the DoD screening board would serve to ensure those eligible for the highest strategic decision-making positions meet the intellectual requirements for the task. Thus, allowing only the most qualified Joint Professionals to move to the top, see Scales, “Return of the Jedi,” 45.

⁹³ Moore, “What’s the Matter with Being a Strategist (Now)?” 18.

